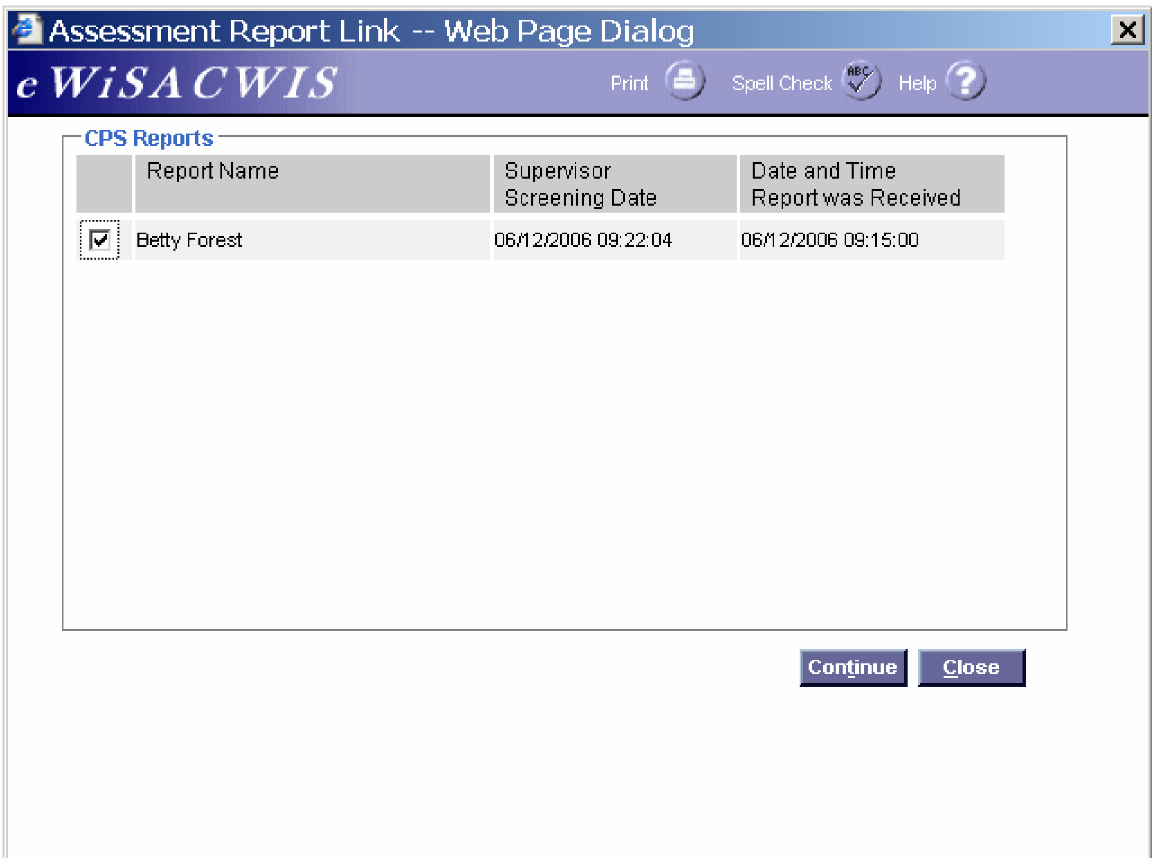
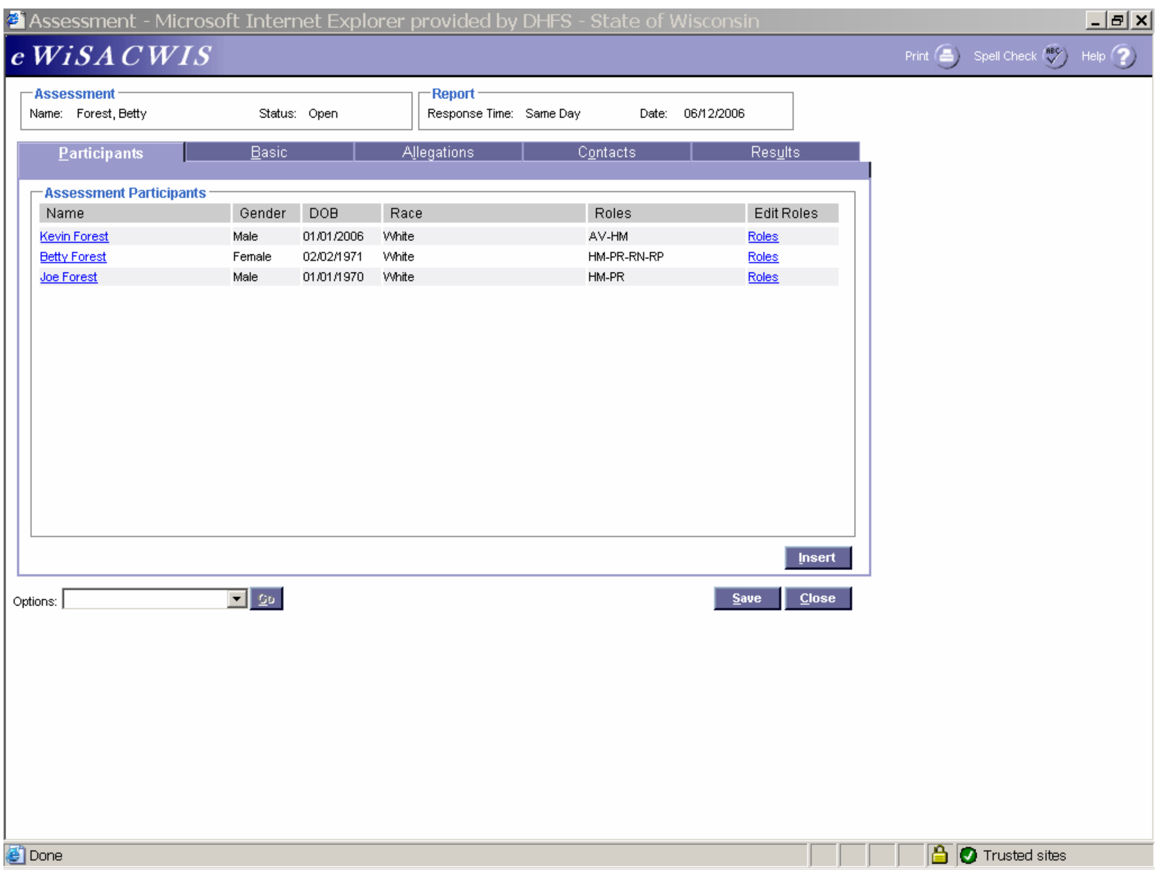
Initial Assessment Narrative – Primary Caregivers

1. From the desktop, go up to Create>Casework. From the Create Casework Page, select Assessment from the Assessment Icon and the family case. No participants are selected.

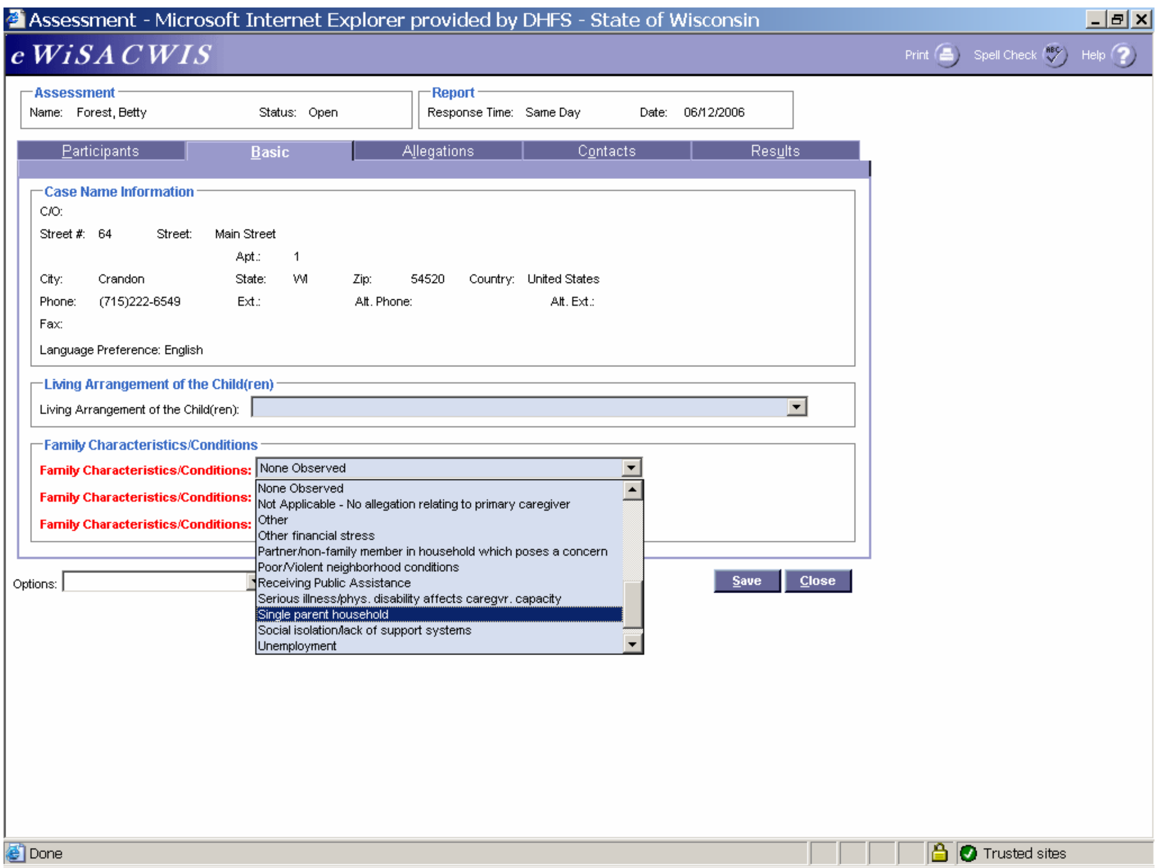
2. The next page will be the Assessment Report Link page. This page will show how many Protective Services and/or Services Intakes that need to be linked to an assessment. Select the check box for the report(s) that are to be linked to this assessment and click continue.



3. The Assessment and Report boxes at the top of the page will pre-fill with case name, case status, response time, and date. The remainder of the page consists of five tabs. The first tab is called the Participants tab. The Participants tab consists of demographic information that is carried over from the Intake. The participant's names are Hyperlinks. If individual information needs to be updated, click on their name and the system will open up the Person Management page for that individual (See Quick Reference Guide for Person Management). The Edit Roles Hyperlink will allow the case manager to edit the current roles for each individual. Finally, the insert button at the bottom of the page will allow additional participants to be added to the assessment. Click on insert and a Pop up message box will open with other participants listed on the Intake. Click the Radio button next to the individuals you want to add to the assessment and click continue (no screen shot).



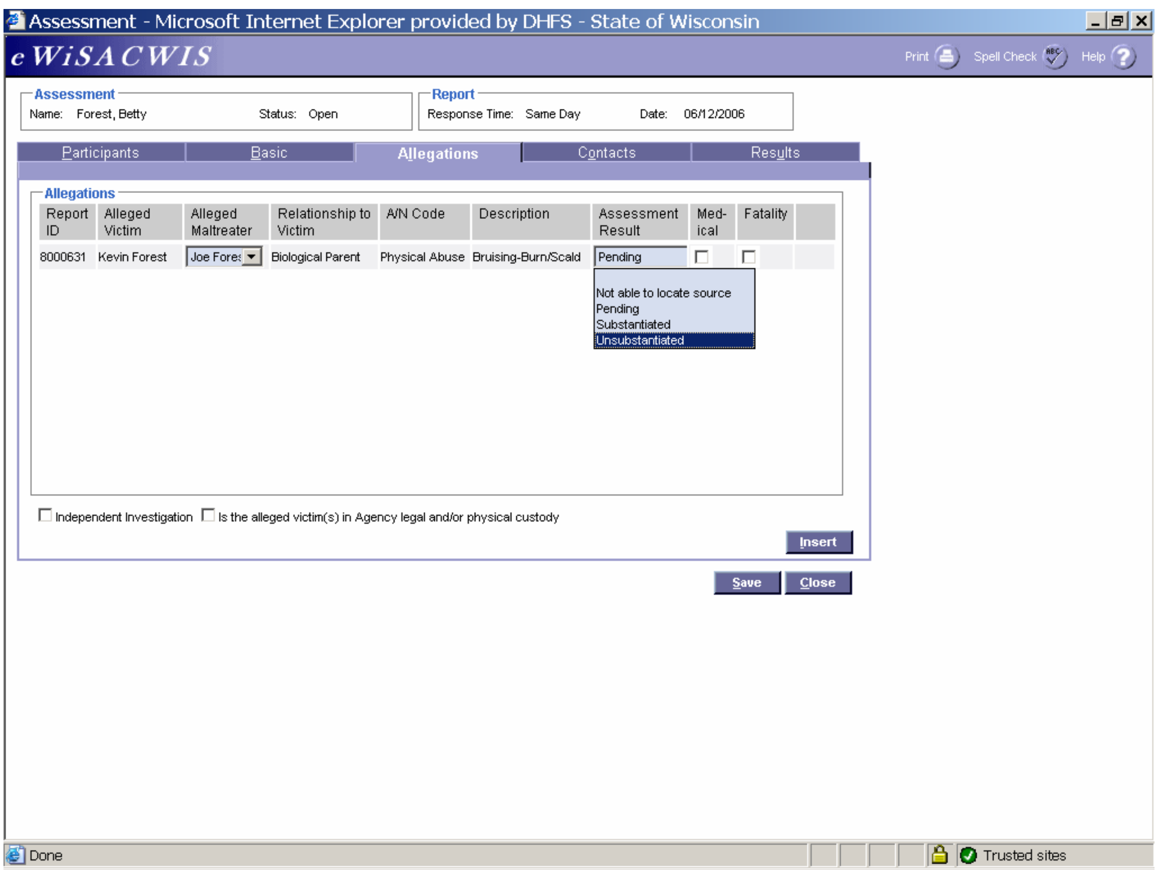
4. Click to the Basic tab. The Case Name Information Box will pre-fill with case demographics. The Living Arrangement of the Children Box is a drop down value. Select the appropriate value of the living arrangements of the children at the time of the assessment. Finally, the Family Characteristics consists of three drop down fields. Pick the values that best describe the family.



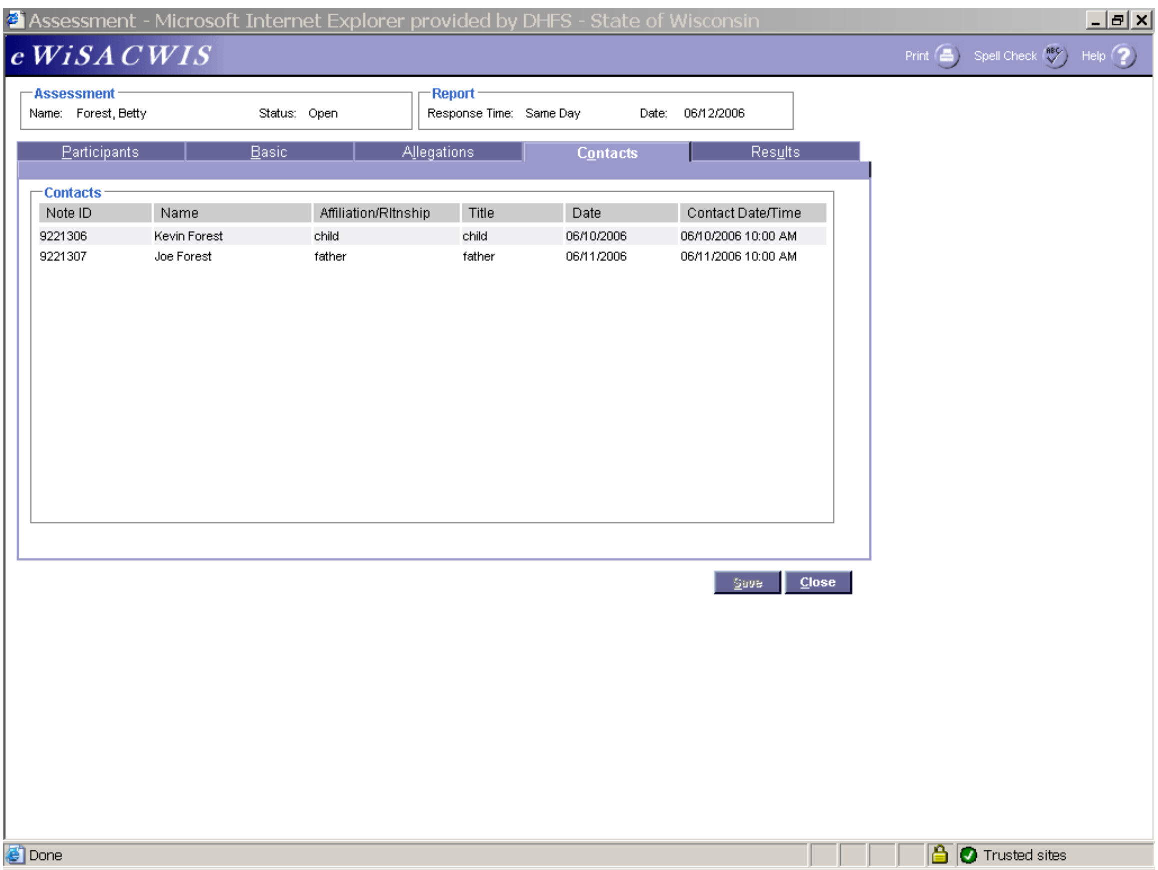
5. The Allegations Tab will pre-fill with the alleged victim and alleged maltreater. The abuse/neglect code and description will also pre-fill from the Intake. The relationship to the victim is a drop down value. Select the appropriate value for the case. The assessment result is also a drop down value. Select the appropriate value. The Medical check box refers to if the child received medical attention for the injury received from the abuse. The Fatality check box refers to if the child died due to neglect/abuse.

The boxes below should be checked if the investigation is an Independent Investigation and/or the victim is legal or agency custody.

NOTE: It is important to complete the Assessment Result prior to supervisory final approval. If the Assessment Result is in Pending Status, the assessment can not be approved.

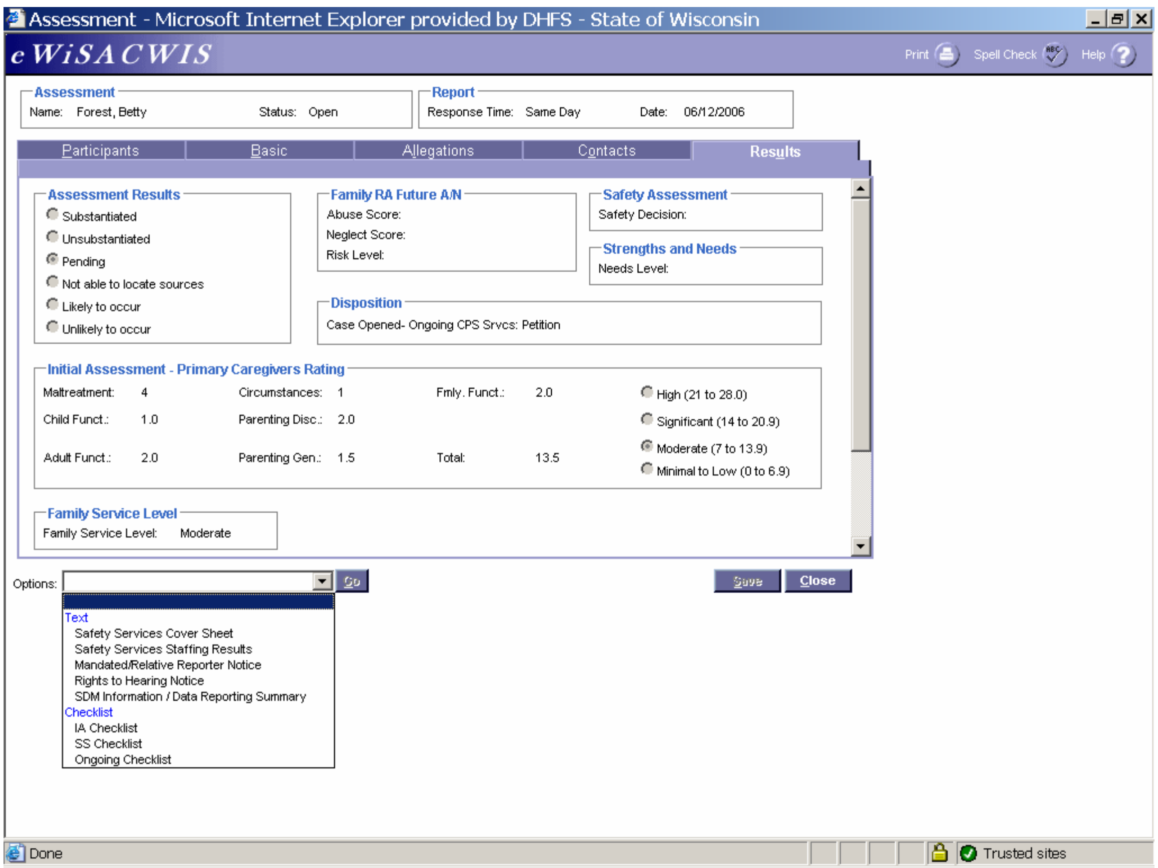


6. Move to the Contacts Tab. This is a view only tab. The Contacts will pre-fill from contacts that were documented in the system. See Quick Reference Guide on how to create Assessment Contacts and Initial Face to Face Contact.

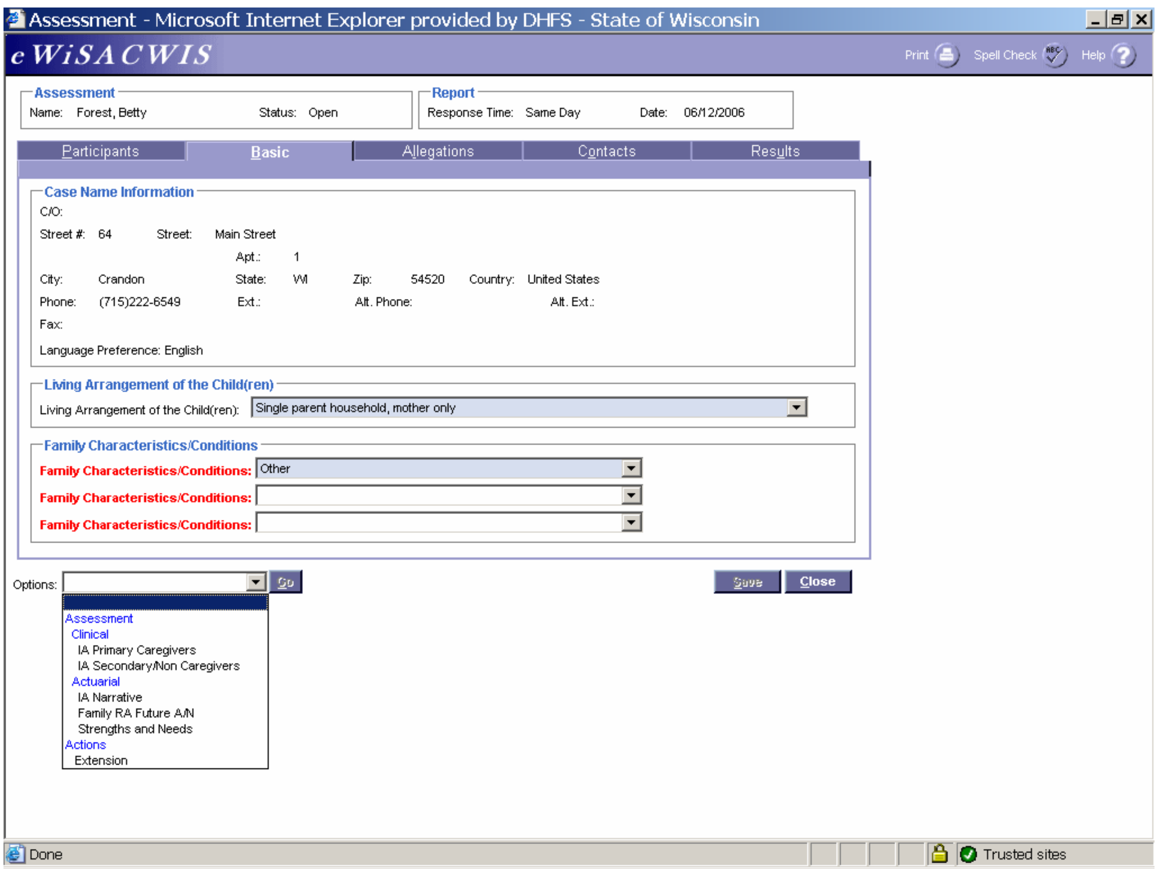


7. The last tab is the Results Tab. At this point, the Results Tab does not have much information that pre-filled. This tab is view only and will pre-fill from information documented in the IAPC.

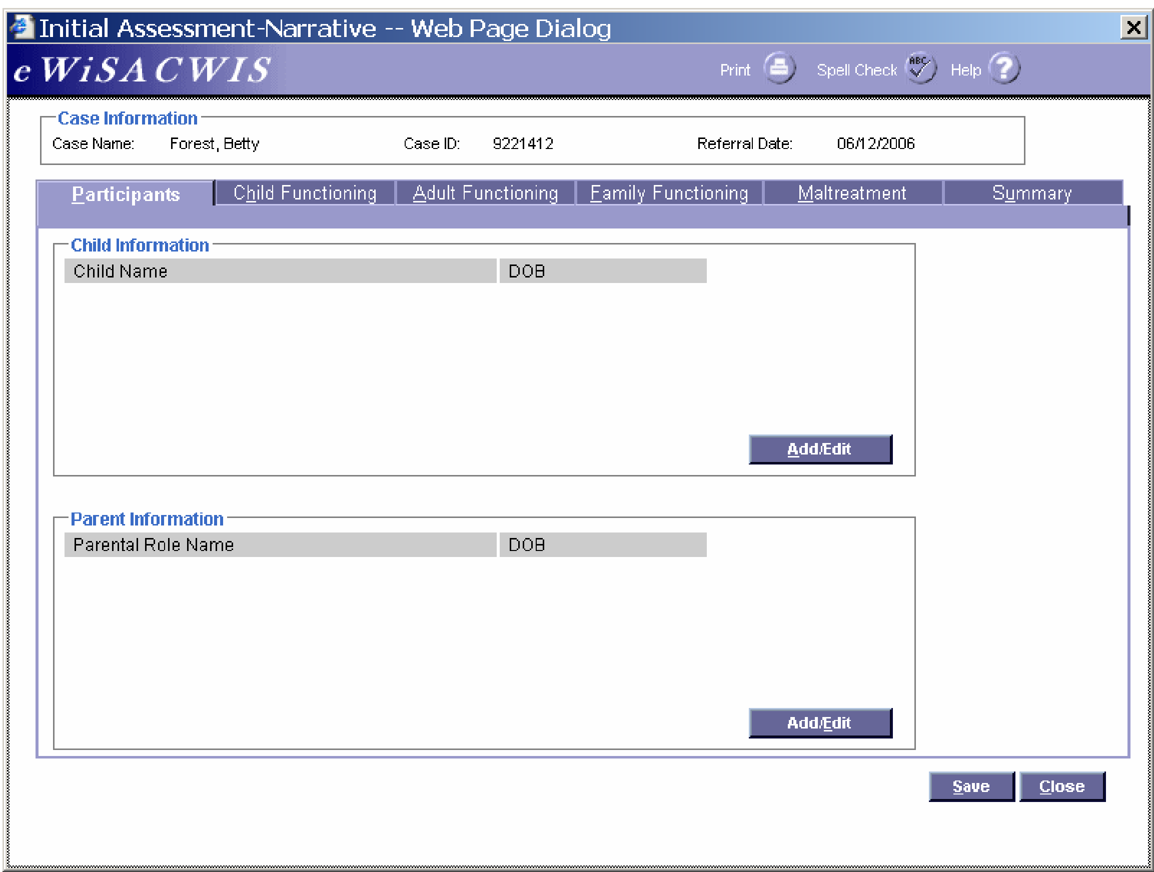
   The Options menu has a wide variety of text documents and check lists for the worker to use.



8. Now, let’s go back to the Basic Tab. Under Options, there are different selections for Assessment. For this example, we will use Clinical – IA Narrative. Click on the Go button.

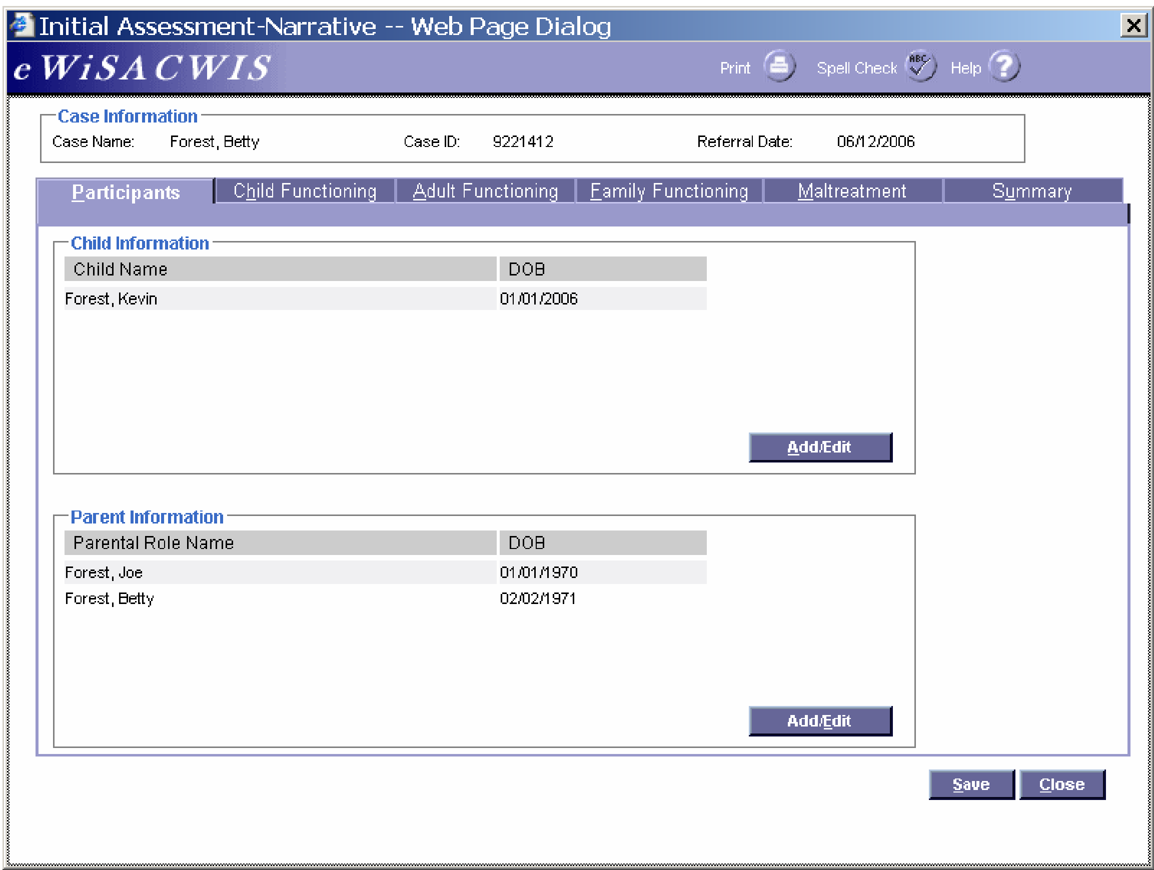


9. The Initial Assessment Primary Caregivers Narrative Page will open. This page consists of six tabs. The first tab is Participant Information. This page is blank and will require the case manager to add participants to the Child Information field and Parent Information field. Use the add/edit buttons on each box to add the participants to whom the assessment applies. The add/edit button will bring up a pop up page.



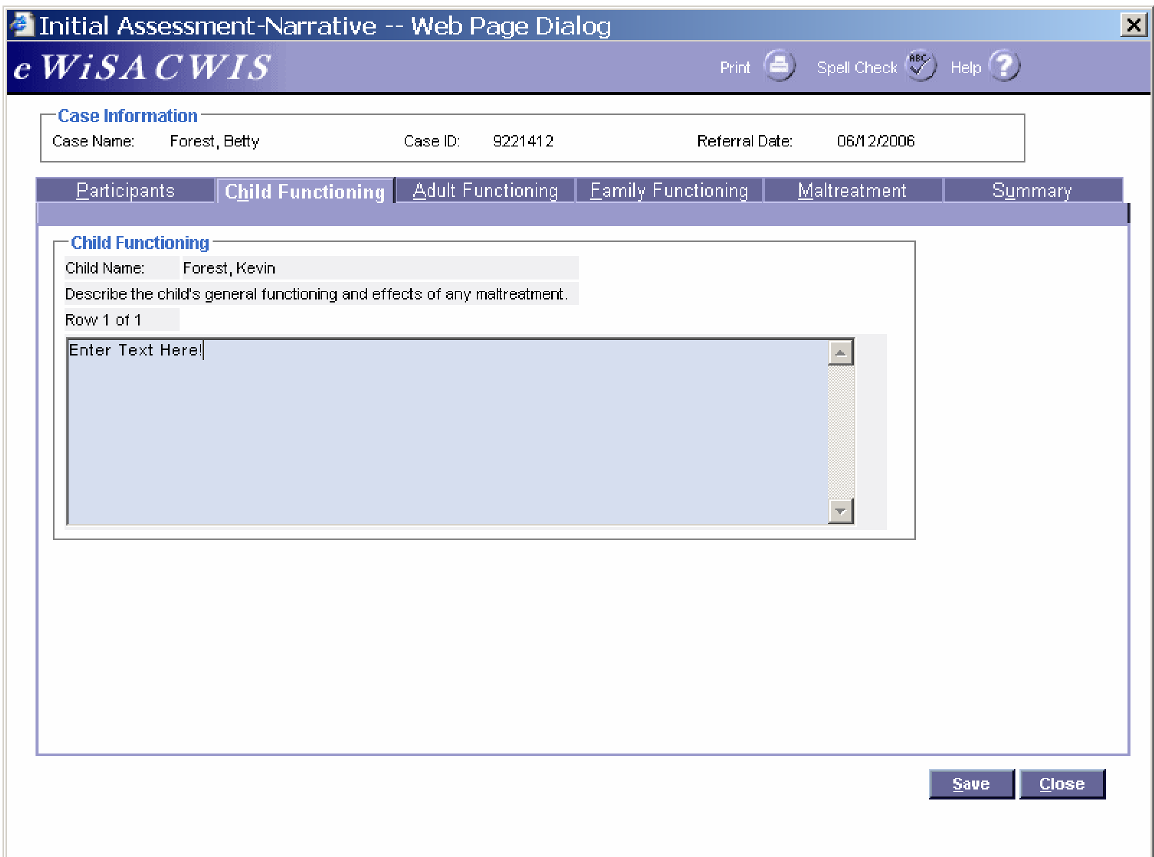
10. Check off the box to the corresponding participant that should be added to the assessment for the Child Information and Parent Information group box and click continue.

11. The Participant Information is now pre-filled with the participants selected from the Case Participant pop-up box.



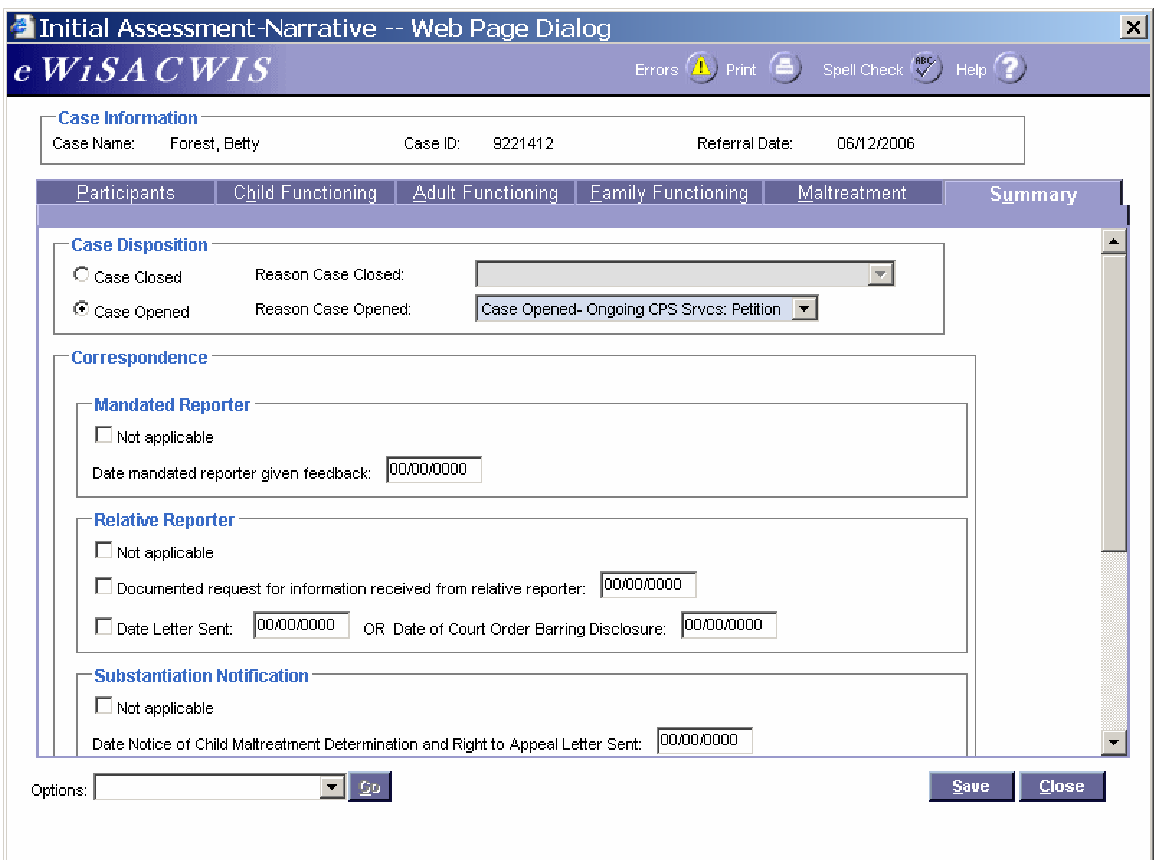
12. The next tab is the Child Functioning Tab. Enter the narrative regarding child functioning. Pay specific attention to the rows and the scroll bar. This indicates that additional participants exist on the page or additional information is not on the screen and the scroll bar will show the hidden information on the page.

    Continue the same process for Adult Functioning, Family Functioning, and the Maltreatment tabs.



13. The Case Disposition group box is to document if the case is to be opened or closed and the reason.

    The next group box is the Correspondence group box. This is used to document if Mandated Reporters, Relative Reporters were notified. It also is used to document if a Substantiation Notification and a Licensing Notification was sent.

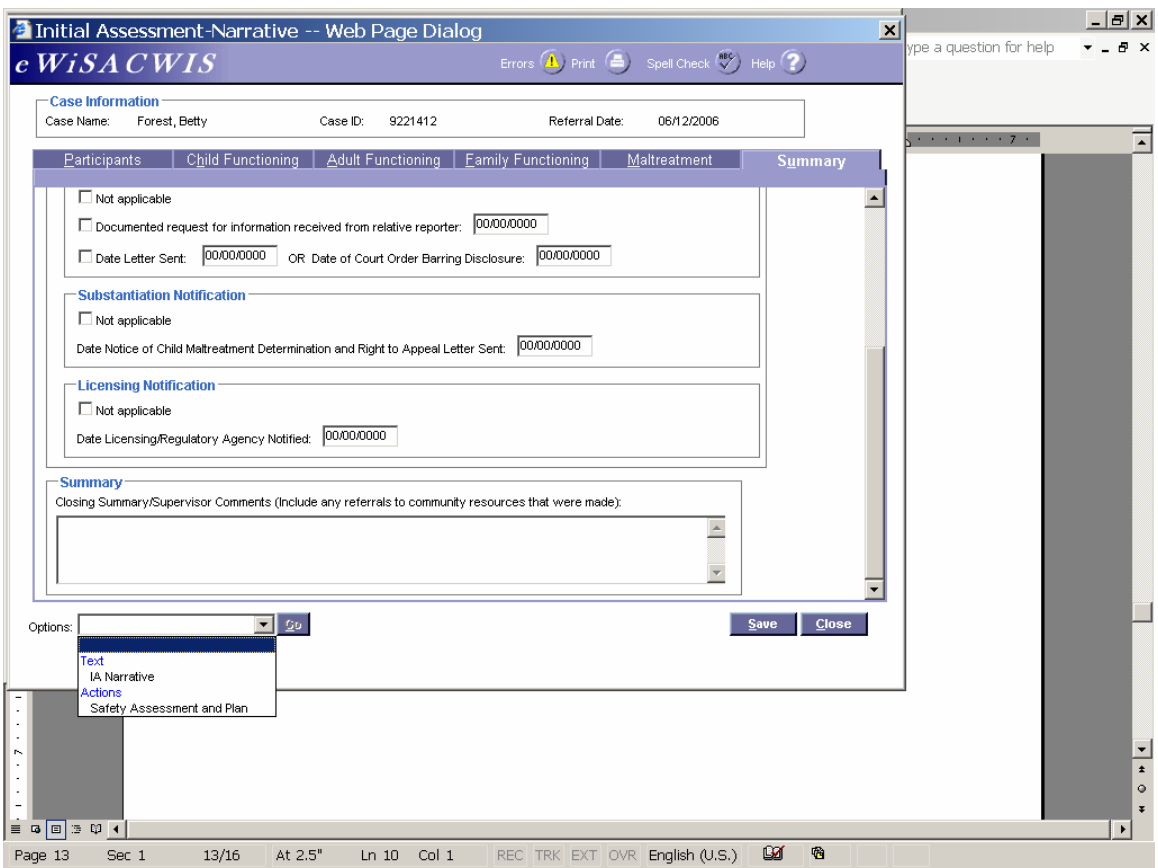


14. The Summary group box documents any comments or information that was not documented elsewhere in the IA Narrative or referrals to other community resources.

    The Options menu allows the worker to open the IA Narrative document.

    The Safety Assessment and Plan can also be launched from the Options menu. Instructions on how to complete the Safety Assessment and Plan can be found in the Knowledge Web under the Quick Reference Guides.

    Save and Close the IA Narrative page to return to the Assessment.



15. Final approval for the Assessment is done on the Participants tab under Options.